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ABSTRACT

Increasing pressures evolving from societal change, technology, and increasing student needs are causing rural school districts to look seriously at school district consolidation as an alternative strategy for the successful accomplishment of educational goals. The process of redistricting or reorganization is characterized by its complexity and inherent internal and community problems. If the decision is made to attempt consolidation, the prime responsibility for the design and implementation of a feasible plan falls with the superintendents and the local boards of education involved. Particular attention must be paid to sensitive issues and the communication established with the community at-large. An acceptable consolidation plan must contain at least the following ingredients: complete definitions of unique constraints to the consolidation goal; the identification of needs, goals, and objectives; the establishment of procedures and strategies; the design of an evaluation subsystem and related criteria such as provision for feedback; a "programed" planning model (time-lines, flowcharts, etc.); and provisions for flexibility. The foregoing ingredients must be coupled with recognized community and educational needs and strong school-to-community communication channels. (AL)

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RURAL AND SMALL SCHOOL CONSOLIDATION--SOME PROBLEMS AND SUGGESTED PROCEDURES

(Prepared for a conference on Appalachia to be held at the University of Tennessee in April of 1971)

by

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CONTENTS

		Page
I.	INTRODUCTION	1
II.	WHY CONSOLIDATE?	5
	Social Mobility	5
	Socioeconomic Factors	6
	New Educational Priorities	7
	Upgrading Staff Qualifications	8
	Curriculum Development	10
	Meeting Minimum State Standards	13
	Physical Plant Change	16
	Economy	17
	Summary	19
III.	PROBLEMS ASSOCIATED WITH SCHOOL CONSOLIDATION	21
	The Community	21
	Internal School District Problems	22
	Financing	23
	State Assistance and Guidelines	24
	Transportation	25
	Summary	26
IV.	SUGGESTED PROCEDURES	27
	Responsibilities	27
	Planning	28
V.	CONCLUSIONS AND RECOMMENDATIONS	32
REFERENCES		33
APPENDIX: BIBLIOGRAPHY FOR NETWORK ANALYSIS		36

I

INTRODUCTION

The very thought of school consolidation creates fear in the hearts of many superintendents of small school districts. For some, it is fear of job loss or loss of a position of power in the community; for others, there is real concern over the needs of the children within the district. It may be stated confidently that, regardless of type of community and political situation, the process of consolidating two or more school districts into a single educational unit is a serious step. It is the purpose of this paper to review a number of concepts and procedures leading to a careful inspection of the need for consolidation as related to the Appalachian region and, if that need is to be fulfilled, to suggest procedures for accomplishing consolidation with the least amount of stress on those concerned.

In general, as one views the broad range of literature on the subject, two distinct dichotomies emerge: a wealth of pro-consolidation and few anti-consolidation contributions. Due to many recent changes in educational techniques, philosophy, and needs, there is a need to review the entire realm of school reorganization, to postulate practical suggestions, and to leave it to the administrator and school board as to the relative merit of the process for his particular area of concern.

The review of literature which bears upon this paper consists primarily of research reported in educational publications in the ERIC system, although some additional sources have been utilized. Most of the research which will be cited has been done within the last eight

years. Additionally, a great many opinions reported in this study are not necessarily supported by empirical evidence.

Within the confines of this paper, the following definitions of school district size are used throughout:

Small School District -- 1 to approximately 800 total enrollment.

Medium School District -- 801 to approximately 15,000 total enrollment.

Large School District -- 15,001 or more total enrollment.

It has been said that the one thing we can be certain of is change. Events in the last decade, including the landing of man on the moon, tend to make this a gross understatement. Scientists tell us that written knowledge will double in the next seven and one-half years. Also, populations are increasing, the national crime rate is increasing, and use of drugs by youngsters is at an all-time high. A dubious honor also is shared by venereal disease. Medium-sized school districts and those in large urban areas have begun to attack many of the problems brought about by the changes which we see occurring at a more rapid pace each day. As evidence of society's spirit to better itself, literally thousands of experimental or innovative programs have been initiated recently. Wisely, it is hoped, society has chosen to bring about this betterment through the programs and activities known as education.

Unfortunately, the degree to which school districts have "tooled up" to cope with everyday changes that this sophisticated world is thrusting upon us has not been the same in all school districts throughout the nation. Particularly noteworthy is the slower pace at which most rural

schools and small school districts have been advancing educational opportunities for their students. This inability to maintain a school agency which will provide for the needs of the community, due either to higher sparsity of population or small size, has brought about an ever-increasing trend toward consolidation of smaller school districts, as well as other new practical solutions which attempt to satisfy these needs.

Rarely will school districts consolidate unless it is believed that they can satisfy better the needs of the community or the students. These needs are not necessarily those which are envisioned by the community alone but are the appropriate educational needs set by national and state priorities and by society in general. In an attempt to isolate specific need areas, Purdy (1) suggested that the ten following clues may be indicative of the complexity of the problem: mobility of the population, the process of urbanization, cultural and economic deprivation, scientific discoveries and technological development, an age of specialization, the emerging world of work, the breadth of vocational opportunity, interdependence, the process of change, and value systems. Considerable dialogue could be written about each of the foregoing clues and their relationships to one another. The average layman recognizes that there are whole shifts in population which affect his job and his station in life. He also feels the pinch of urbanization, the crowded conditions, and the pollution. He is also aware of the medical and technical discoveries which are important to him. He

recognizes how specialized society has become regarding divisions of labor. He is aware of the changes of job descriptions, the types of products produced in factories, and the broadening number of vocational opportunities which are being provided for him or his children. He is acutely aware of the interdependence of people for survival in our society, the process of change, and his own value system. Perhaps most important, the average American citizen relies upon the educational system, for which he pays, to assist him and his progeny in maintaining satisfactory progress in terms of their needs. If the specific needs relating to the aforementioned clues are not satisfied by the existing school system or educational system, some necessary changes must be made. Unfortunately this all too often applies mainly in smaller rural communities and leads to the consolidation of schools or some other equally important alternative. Categorical areas of concern which relate to the possibility, purpose, problems, and procedures of consolidating school districts are briefly discussed in the following pages.

II

WHY CONSOLIDATE?

Social Mobility

It is recognized that populations have been drawn into urban or suburban areas at an ever-increasing pace since the beginning of the 1900's. A number of factors contribute to this phenomenon, but it is fairly evident that most people are going to move into areas offering jobs, adequate services, and new experiences. Regardless of the reasons for this migration, one consequence is outstanding. The rural areas within our country are decreasing in population. Land ownership is more often coming into the hands of conglomerates, cooperatives, or large companies. Farming methods have changed with the advent of automation, and job opportunities in rural areas are becoming scarce. Thus, the small school district or small school is burdened with providing adequate educational opportunities for those populations remaining in rural areas--often without an adequate tax base and, undoubtedly in some areas, with inadequate concern by the older generation left behind. Consolidation of these smaller school districts into a larger or unified educational system appears to be one feasible alternative for the provision of an adequate education to students who dwell in small villages and towns.

On the surface, it would appear that with this age of technology--which includes the mass communication systems, the ability to move about easily, the changing times, etc.--our school systems nationwide should be similar to those elsewhere. However, Bohrson (2), in an article from Bulletin of the National Association of Secondary School Principals, concluded that this assumption is invalid. In keeping with this, he

contended that if one were to survey small communities, in particular small schools, it would be discovered that many people in the small schools just have not "gotten the word." It should be noted that this may also be true for medium and large schools.

Socioeconomic Factors

Cushman (3), in his paper on the role of school district reorganization and improving rural education, cited thirteen factors which have led to a number of social and economic changes taking place in the rural areas of the United States: lessening of rural isolation, commercialization of agriculture, the move from hoe farming to mechanized farming, the shift from folk beliefs and practices to the use of science in agriculture, the shifting of processing of farm products from farms to factories, the loss of folk arts and skills, the increase in part-time farming, the decreasing proportion of population in rural areas on farms, the decline in operation of the agricultural ladder with an accompanying greater investment for the young man to get a start in farming, the declining status of hired farm workers, the rising standards of living in rural areas, decreasing rural-urban differences, and changing methods of obtaining security. Each of the foregoing factors contributes to the difficulties of rural schools in providing sound educational programs for the populations they serve. These changes in rural life have also brought about strategic changes in providing for rural education. According to

Rhodes (4),

> In the 28 years from 1932 to 1960, 117,000 operating school districts have been reduced to a little over 35,000--a drop averaging almost over 3,000 school districts a year or about 2½ percent a year.... In the 5 years between 1955 and 1960, the rate of drop averaged about 6 percent a year. Clearly the changes are coming faster and these changes have resulted chiefly in the elimination of non-operating districts and districts with fewer than ten teachers, especially the one-teacher districts. In 12 years (1948 to 1960), one-teacher schools have dropped almost 75 percent, from just under 75,000 to a little over 19,000.

Based upon the above, it might be assumed that consolidation is not only something that has been with us for some time but that it is likely to continue. As rural America continues to change its social and economic characteristics, additional changes in school systems may be warranted.

New Educational Priorities

Late in 1957, the United States "geared up" to increase national production of scientists, technicians, and mathematicians to offset the possibility of losing a space race. Numerous national legislative acts were passed which provided large sums of money for strengthening school curricula in the areas of science and math, as well as for training additional teachers in these fields. More recently, other Federal legislation, including the Vocational Education Act of 1968, has brought more emphasis to bear upon the problem of providing saleable skills to the populations leaving the schools and entering the world of work. For each instance of change in national priorities, which in turn have become state and local priorities, large amounts of resources are needed to create new curricular programs. It is understandable that small school districts and

rural schools find it difficult to maintain effectively the necessary equipment, building facilities, and trained staff to accommodate these shifts in the curriculum. In some instances, Federal funds are available for upgrading smaller school systems so that they may provide the necessary offerings for a national priority. Unfortunately, as evidenced by the numerous regional laboratories assisting small schools in planning for grants, administrators of small schools have neither the time nor the skills to prepare proposals for grants or to accomplish necessary planning. Most often, the superintendent in the very small school system not only has administrative but also teaching duties. This, naturally, inhibits his ability to attract funds for his school system.

Upgrading Staff Qualifications

Institutions of higher learning, because of distance and other demographic limitations, have been unable to provide retraining for teachers in many rural areas of the country. Although many institutions provide extension courses and operate branch colleges within local communities, teachers in sparsely settled areas sometimes must drive or commute long distances in order to attend classes. Undoubtedly, this arrangement exists because most colleges and universities tend to select sites near large urban or metropolitan areas; however, some states have attempted to place institutions of higher learning in a centralized location to their projected enrollment population.

These problems have no specific bearing on rural education other than the amount of difficulty a teacher faces in upgrading his skills.

Coupled with this fact is a phenomenon which occurs all too often--teaching salaries in rural school districts are sometimes so low that teachers must acquire summer jobs and therefore do not have time for retraining.

Cushman (5) stated that

> The rural areas of the nation have also had a disproportionate share of the teachers whose educational qualifications were below standard. Of all the teachers in the public schools in the United States in the late 50's, there were 53.2 percent of them holding bachelor's degrees, and 24.6 percent master's degrees or higher. However, for rural teachers the figure was 49.3 percent holding bachelor's degrees and only 11.5 percent holding master's degrees.... In other words, much of the task of upgrading the level of teacher qualifications in the United States is a rural problem.

Although Cushman's study was done in 1967, one needs only to visit a few randomly selected rural or small districts to substantiate the foregoing. It is interesting to note that Bohrson (6) did not agree with this; he concluded that the apparent low quality of programs in small schools is not attributable to the teachers:

> In my judgement, based upon visiting, speaking, observing, and coordinating programs for small schools, the percentage of dedicated, able, resourceful, and intelligent teachers in these [rural] schools is as high as in any other arbitrary grouping which we might analyze but, because the critical point is the leadership, the commitment and the hidden excellence of the faculty are sometimes stifled or, at best, prevented from flourishing by substandard administration.

Additionally, it is interesting to note the reaction of Alfred Schwartz, Dean of the College of Education at Drake University (7), who stated that one of the keys to quality education includes "the teaching staff assigned to the areas where they are trained to teach and the professional staff with high qualifications are employed and are given the opportunity to perform their duties." It can therefore be seen that the

upgrading of teacher qualifications is a multifaceted problem. It involves not only teachers and teacher educators but also includes administrators.

Hopefully, some benefit will be derived by alleviating many of the teacher-qualification problems in rural and small school districts through the Education Professions Development Act (EPDA) which was implemented in 1969. Evaluation reports which the present author has seen in the office of the Director of Education in Austin, Texas, seem to indicate that EPDA efforts are having some beneficial impacts upon the problem in Texas. One limitation to the EPDA program, however, is that of specific priorities set out by national and state offices which may not necessarily satisfy the total needs of the teachers within a specific rural or small school district. Often, where more advanced technical working skills are needed--for example, in the computer field--these are not included in national priorities.

The upgrading of teacher qualifications certainly might be a factor in deciding whether school consolidation would be beneficial to students. It should be noted, however, that the emerging intermediate district or education service center may negate, to some extent, the importance of this factor since some education service centers, such as those now organized in Texas, provide training for teachers in remote areas wherein the training is taken to the teachers.

Curriculum Development

In 1964, Burton W. Kreitlow (8) from the University of Wisconsin

conducted a long-term study of educational effectiveness of newly formed centralized school districts in rural areas. Three specific areas were examined in Kreitlow's study: (a) opportunities available for teachers and students, (b) academic achievement and personal and social adjustment, and (c) social and economic context of parents. In his concluding remarks, he stated that

> In academic achievement boys and girls in reorganized districts outperformed those in non-reorganized districts. The evidence throughout 12 years of education indicated that the contact with greater opportunities did make a significant contribution to mental development.

These findings would be more significant if all of the variables which contribute to greater achievement of the students were isolated, identified, and analyzed. This results of the study, however, do lend support to the concept that school consolidation fosters better curricular development. If we use Turner's definition (9) that "curriculum has been defined broadly as all experiences which students encounter that are under the auspices of the school district," it becomes evident even to the layman that smaller school districts, due to a number of limitations, are unable to offer the same multifaceted curricular opportunities as a medium or large school district. Specialists in specific fields of endeavor--such as data processing, romantic languages, and in some instances guidance--are usually inaccessible to students in many rural schools.

There is some concern by many leading educators regarding the contracting of specific "curricular packages" by commercial companies. These educators maintain that if commercial enterprises can guarantee greater

student achievement via their programs, then there is some doubt about the effectiveness of the existing school curriculum. In this regard, Turner (10) pointed out that a number of commercial companies have taken advantage of the Federal funds which have been provided to specific programs such as those on compensatory education and vocational-technical training.

According to Turner (11), the central curriculum staff for school districts should include specialists in each of the following areas: art, audiovisual aids, business, data processing, early childhood education, English/language arts, evaluation and research, exceptional child education (both talented and retarded), Federal relations, home economics/family relations, industrial arts, languages, library services, mathematics, music, occupational-vocational education, physical education, science, and social science. However, in general, curriculum specialists command higher salaries than the traditional teacher. Additionally, some state minimum foundation programs require a certain enrollment level in the school district prior to funding specialist staff positions with minimum foundation monies. This places the rural and/or small school district in somewhat of a bind although there may be a desire for such specialists and capable teachers.

A school district in such dilemma has a number of alternatives: the procuring of specialists through local funds already heavily burdened; the utilization of consultants, which may be less than satisfactory; or the utilization of education service center staff if available. One other alternative is the consolidation of the school district or the entrance into cooperative curriculum development programs.

Turner (12) stated that

Research shows a definite relationship between school size and earmarks of quality as measured by
--Efficiency in operations
--Low cost per pupil
--Teacher qualifications
--Teacher assignments in major fields
--Number of subjects and courses offered
--Special services and enriched programs
--Technical specialization of employees
--Scholastic achievement of pupils
--Counseling and library programs
--Percentage of graduates entering college.

Larger schools give children a broader, richer, higher quality educational opportunity at a lower cost per pupil.

Meeting Minimum State Standards

In Ellis Hanson's study (13) of Great Plains states, the following major implications for educational planning were revealed:

1. The criteria [sic] of a local community or a group of interrelated local communities as the basis for a school district is obsolete and indefensible....

2. Local school districts should be organized around city centers with populations of at least 2,500 to 5,000....

3. All areas of each state should be in a K-12 district....

4. Future school district reorganization should be based upon comprehensive state-wide planning....

5. An enlarged and strengthened middle echelon of school government should be developed in the four Midwest states....

6. Increasing attention must be directed to the problems of urban education in the Midwest.

These statements were made as guidelines to the various state departments involved in the study and have definite implications for possible future state standards for school districts. The report of the Governor's

Committee on Public School Education in the State of Texas (14), published in August of 1968, reads as follows regarding recommendations to the state legislature related to low standards:

> Every operating district should contain a minimum of 2,600 children in average daily attendance in a 12-grade system, with three exceptions:
>
> > Countywide (or larger) districts may be allowed to continue operation as independent systems within a minimum of 1,600 ADA;
> > Countywide (or larger) districts may be allowed to operate as "Sparse Area Districts" with less than 1,600 ADA on a program approved by the State Board of Education; and
> > "Special Purpose Districts" (such as those operated on military bases, at State institutions and by private corporations such as "Boys Ranch") may be allowed to continue operation with less than 1,600 ADA on a program approved by the State Board of Education.

It is interesting to note that the foregoing minimum standards were recommended to the Texas legislature during the last session and, in a sense, implied gross reorganization and consolidation. The measure was promptly defeated, even though provision was made for severance pay in the amount equal to one year's salary made at state expense to any employee whose job would be eliminated by changes in organizational structure. Although no recent specific data were available relating to the minimum state standards for school districts in the Appalachian region, one trend emerges: consolidation of small school districts into larger districts may meet with resistance, as was the case in Texas recently.

McClurkin (15) proposed the following criteria for good school operation:

I. High school teachers should hold at least a master's degree with adequate professional training and a major in the teaching field....

II. High school faculties should be composed of a large core of experienced teachers and should be balanced between experienced and inexperienced teachers....

III. No high school teacher should be assigned to teach a subject for which he does not hold endorsement on his teaching certificate....

IV. A proper balance between men and women teachers should be maintained in the high school grades. Based on the ratio of boys to girls in the southern high school population, approximately 50 per cent of the teachers theoretically should be men....

V. The salary schedule for teachers and other instructional staff in any southern high school should be competitive with comparable high schools within the nation....

VI. High school class size should average not more than 25 pupils within a size-range of from 20 to 30 pupils....

VII. A teaching load of 150 pupils daily or 750 pupil periods per week should be the maximum load assigned to high school teachers. This assumes a teaching day of five periods with a maximum of 30 pupils per class....

VIII. A "standard" high school should contain a minimum of 100 pupils enrolled in Grade 12. The optimum size should be from 800 to 1,200 students, with a minimum-maximum range of from 500 to 1,500 students....

IX. Quality in education is related to expenditure levels when spending is efficient. Efficiency, however, is reflected by lower per-pupil costs for a uniform or standard educational program....

X. A four-year high school should offer a minimum of 3.2 times as many Carnegie units as are required for graduation. The minimum for a three-year senior high school should be a ratio of 2.4:1.

Most educators would agree that if the foregoing criteria were adopted by the southern schools (e.g., Appalachian schools), a large number of

small and rural school districts could not meet such standards. As a matter of fact, it is highly probable that many medium and large school districts would have difficulty meeting all of the criteria stated. However, there is a desire on the part of educators to develop further the curriculum being provided in schools, as evidenced by the setting of new standards for states and thereby providing greater educational opportunities on a statewide basis.

Since a small rural school district may not always be able to cope with new or more stringent standards, it would be most unfair to propose that a school district be of a certain size without providing adequate exceptions to meet contingencies unforeseen by the legislators or boards of education involved. Nonetheless, there will be continuing pressures upon many small school districts relating to the meeting of state standards. Thus, such districts may choose the alternative, when feasible, to consolidate.

Physical Plant Change

In the Otego and Unadilla consolidation in New York (16), the following conditions prompted the consolidation of the two school districts:

a. Otego Central, built to hold 450 pupils now had 661. Unadilla Central, built to hold 678 now had 887.

b. Both Otego and Unadilla were using every available public building in their respective villages--on a year-to-year approval by the State Education Department.

c. Neither gymnasium was large enough.

d. Junior and Senior High School science labs and libraries were both antiquated and inadequate.

e. Otego had no Industrial Arts facilities and Unadilla had no Vocational Agriculture.

It is not uncommon to find school districts consolidating because of inadequate facilities by one or both. Sometimes the population shifts within the area have left school plants on the outer perimeter of the population tract. More often, school facilities constructed forty to fifty years ago are no longer educationally feasible or safe. Castaldi (17) listed the following reasons for not remodeling (and thus abandoning) an educational facility:

1. The school under consideration is no longer needed in its present location.

2. The building has structural defects that cannot be corrected at a reasonable cost.

3. The school is educationally obsolete and cannot be modernized at a reasonable cost.

4. The building is unsafe or unhealthful and cannot be made safe and sound at a reasonable cost.

5. The site is inadequate and cannot be expanded or improved at a reasonable cost.

The need to abandon or tear down and reconstruct a school building is often a problem faced by school boards. Many times, the school district is already bonded to capacity and cannot afford a tax increase. One alternative is to consolidate, with the possible advantages of increased bonding capacities or taxing by the new and larger school district.

Economy

Austin D. Swanson (18), in 1966, conducted a study of school

districts in New York and found that (a) size of the school district population was directly related to potential efficiency, (b) very small or very large schools were adversely affected by size, and (c) districts with a total population between 20,000 and 50,000 were not adversely affected.

In a 1965 survey report (19) of the organization of school systems in Georgia by the George Peabody College for Teachers, numerous references were made to the school size and cost relationship. The consensus was that excessive costs were usually found in districts with fewer than one teacher per grade and that per-pupil cost decreased rather rapidly up to 100 pupils and continued to decrease but remained stable at the 300-pupil level. Additionally, per-pupil cost increased in schools having above 1,000 enrollment.

The report by the Governor's Committee on Public School Education for Texas (20) stated that

> School district reorganization often produces staffing economies in the enlarged district. For example, officials estimated that recent consolidations to the San Angelo District have saved more than $100,000 annually in administrative costs alone.

It is recognized that the consolidation of school districts would do away with some duplication--including administration. However, it is pointed out by the Catskill Area School Study Council (21) relating to the Otego and Unadilla consolidation that quite often, at least initially, there are some incurred costs created by the consolidation itself. Not the least of these costs is provision for adequate transportation

of pupils.

A possible advantage of consolidation is the establishment of an equitable tax base. This is particularly true if one school district has a larger tax base from which to draw. However, Alvin Rhodes (22) pointed out that rural areas may be taxed to their capacities and that, in such cases, other methods of securing and distributing funds for school support are needed. Therefore, school districts which are already bonded to capacity and which have fairly equal tax rates probably will not gain much in the way of additional funds through a consolidated taxing structure even though a more economical school system might be formed.

Summary

Although the foregoing brief categorical discussions have a pro-consolidation flavoring, some documents support anti-consolidation. For example, in a 1968 speech to the Minnesota Commission on Interim Education, Margery Burns (23), a political writer, cited several unique benefits of a small school as ascertained from results of a questionnaire sent to superintendents, from results of educational studies, and from reports and quotations of prominent educators. Benefits included flexibility in programming, potential for individualized instruction, and excellent teacher-student situations.

Nonetheless, numerous documents call for acceleration of the reorganization of small schools although case studies and recommendations appear to be unique for each district or area involved. It should be

noted that there are benefits of school consolidation which have not been discussed directly. These include greater chances for Federal money, improved political environments, and more efficient pupil transportation systems. However, in the final analysis, the decision as to whether or not to merge school districts must be made with a view toward local prescription.

III

PROBLEMS ASSOCIATED WITH SCHOOL CONSOLIDATION

If the decision is made to consolidate school districts, a number of problems should be anticipated by the administrators, school boards, and planners concerned. These problems deal directly with such factors as the community, organization of the schools, financing, legalities, assistance from state agencies, communications, and political involvement. Arriving at agreements between administrators and boards of the schools to be consolidated apparently is almost insignificant when compared to the job of selling the package "to the public." Isolation of the various constraints to the consolidation process will be attempted under separate subheadings.

The Community

It is possible that the potential voters on a consolidation issue may be, in effect, apathetic toward the whole process. It is not uncommon to see small voter turnouts for the school bond issues and referendums in many communities.

In the case study of the Otego-Unadilla school district reorganization (24), seven elements were given as main reasons for community opposition to centralization (consolidation): concern with increased cost, prospective loss of local control, transportation issues (conveyance of pupils over long distances), preference for an alternative plan, resistance to change, conflicts among prospective districts, and internal controversy.

Isenberg and Taudien (25) found that the most commonly expressed reason for opposing consolidation was that of taking control of the school away from the local people.

Cushman (26) pointed out that what is often forgotten by local leaders is that education is a function of the state and is a state responsibility--it is not necessarily a local function as is believed by many of the community leaders. If there are valid reasons for the consolidation of school districts and such a merger is condoned by the state agency, then it becomes the job of the planners of the consolidation effort to communicate to the community the overall benefits of such an effort.

It has been illustrated amply in a number of consolidation cases--including the Otego-Unadilla case study--that a number of communities lack understanding of the benefits to be derived and have resisted consolidation because of what they conceive to be an impending threat to their local autonomy.

Internal School District Problems

As was implied in the opening statement of this paper, one of the most powerful forces against consolidation of school districts is the superintendent who is very likely to have his job abolished. During the planning efforts leading to massive consolidation of schools in Texas, the superintendents banded together in the small school organizations and managed to defeat the idea before it reached legislative proportions.

In addition, Isenberg and Taudien (27) found that

> Not infrequently teachers are among those who oppose consolidation. Their motivations may be different. Some are accustomed to an almost complete lack of supervision in their small schools. They view consolidation as a threat to their freedom and flexibility. Many are totally without experience in a larger school system and fear whatever it is that is unfamiliar to them. Some of those with low qualifications become opponents because their lack of adequate professional preparation would not be accepted in a consolidated school.

It is conceivable that some of the fear on the part of teachers is natural and that teachers not properly certified would want to protect their security. Unfortunately, teachers with the low qualifications may not be able to receive the assistance they need due to the distances they must travel to fulfill certification requirements. On the other hand, teachers who fear being thrown into a large school system because it is unfamiliar should constitute no real problem if the consolidation planners include them in the planning effort.

Financing

Isenberg and Taudien (28), among others, concluded that perhaps one of the strongest retarding factors to consolidation of schools is fear of increased taxes on the part of community voters. It should be pointed out that many states such as Texas provide incentives for consolidation. According to the Otego-Unadilla case study (29), the State of New York also provides funds for specific activities after a consolidation has been accomplished. It would be to the advantage of the planners of a consolidation to make the community aware of the incentives as well as the proposed increased economy resulting from a reorganization.

State Assistance and Guidelines

Little can be found in the literature relating to state statutes and guidelines which would be apropos for the scope of this paper. It is assumed that each state educational system and the statutes required for consolidation are unique, but some commonalities exist.

Isenberg and Taudien (30) cited one commonality which is of paramount importance to planners of a consolidation:

> In one important way...all states are alike. Once a new district is established by voters' approval, the former districts go out of existence. A new legal entity is created. The formerly existing districts no longer have any legal basis.

Most states have established provisions for two or more school districts to vote to become a single unified school district; however, there is no legal basis for two originally separate school districts to split a district, once consolidated, back into the same original organizations unless the vote is made by the consolidated district itself--that is, two districts, after consolidation, form a single district and must vote as such. Therefore, consolidation is fairly permanent and is infrequently reversed although there are exceptions.

In 1968, the Texas governor's committee report (31) recommended that incentives be awarded to extremely large districts such as Houston to divide the district into more manageable districts. Such special provisions, however, do not affect the rural school consolidation picture.

Although undoubtedly there are detailed state guidelines for

consolidation, it was noted in the Otego-Unadilla case study (32) that the state guidelines lacked specificity and that this had somewhat of a hampering effect. For example, in New York, not only did the citizens have to vote on the consolidation plan but, as the planning continued, they had to vote on the site for the new school which was to be constructed.

Transportation

DeGood (33) suggested that opponents to school consolidation frequently cite transportation as one of the main concerns of voters. He concluded that opponents of consolidation are concerned with two specific areas related to transportation: length of time students might be required to ride a bus and increased cost. DeGood contended that in this age of modern and rapid transportation, relatively long distances to be traveled should no longer be a point of contention since it is wiser to bus students to an educational facility where a quality program may be offered than to have them remain in school districts with substandard educational opportunities. DeGood also stated that large cities spend only 1.4 percent of their current operational costs for the operation of pupil transportation systems, whereas rural areas spend approximately 3 percent (or twice that) for transportation. It appears that, if these figures are still current, 3 percent of the total operating budget is not a significant amount to warrant an argument. If these facts were pointed out to the community by planners of the consolidation, and if it were shown that bussing children to a better school environment would be worth the added cost, this problem could be dealt with appropriately.

In many parts of the Appalachian region, extremely rugged terrain will hamper the establishment of efficient pupil transportation systems. In areas where this is the case, other alternatives need exploration. These might include shared services, mobile classrooms, and dormitory schools.

Summary

Certainly the foregoing areas of concern to planners of a consolidation are not complete. Each community has unique problems. The attempt here has been to present problems which have become evident through previous consolidation efforts, although there are no cookbook solutions to any of the problems cited or to those which were omitted. Hopefully, the planners of a school consolidation will heed the old statement that identifying the problem is part of its solution.

IV

SUGGESTED PROCEDURES

The review of available literature produced virtually nothing relating to suggested procedures for the consolidation of schools in Appalachia. The following discussions are presented as a means of bringing into focus some of the impending needs relating to the planning process and procedures for school consolidation in rural areas.

Responsibilities

Responsibilities for public education in the United States are shared by various social entities. The Federal Government sets the priorities. The states have the responsibility of providing the educational systems, dispersing funds, and accomplishing established educational goals. At the local level, state-originated guidelines are implemented. In the case of consolidation, the superintendents and administrators of the school districts are the prime leaders. It is their responsibility to identify the needs, provide the leadership, and communicate the educational needs of the students to the voters who will eventually decide upon the issue. It is the teacher's responsibility to approach any educational change, including consolidation, with an open mind and with student needs taking priority. It is the responsibility of the community at-large to attempt to understand what educational changes are being proposed prior to making a final decision at the polls.

Sometimes, due to the lack of communication or due to other problems which have been mentioned earlier, the superintendents, teachers, or

community at-large may be unwilling to accept these responsibilities. It then becomes the burden of the consolidation planners to produce a plan wherein all of the aforementioned responsibilities are discharged.

Planning

Prior to making the decision as to the necessity of consolidating, careful planning must be accomplished. If we define needs as a difference between "what is" and "what should be," then the planning process can be put into perspective. Although numerous papers have been written relative to the planning process, the strategy to be discussed here was suggested to the present author during workshops (the Planning Process Laboratories*) conducted in 1969 by the Texas Education Agency. The procedures offered have a great deal of similarity to many other planning strategies. Briefly, the steps in the planning process are to determine the needs, establish goals and objectives, establish procedures, establish evaluation criteria and provide for feedback, program the plan, implement, and change when necessary.

Identification of Needs

Castaldi (34) recommended that, prior to constructing a building, a complete school survey be made--including facilities, programs, and personnel in all of the school districts considering consolidation. The

*For additional information concerning the Planning Process Laboratories, contact the Director of Planning, Texas Education Agency, Austin, Texas.

survey will provide data to be used later in planning stages for decision making and in implementation. Since consolidation involves school buildings and sites, educational programs, finance, administration, and other related areas, it would be advantageous "to get the big picture." When the school survey is completed, or almost completed, only then can planners of the consolidation begin to relate the "what is" to the "what should be." By the intelligent combination of what is required in terms of curriculum development and programs to upgrade the educational standards of the school district to be created, the needs may be accurately identified. Each of the needs should be categorized and placed into its respective priority level. When this step is accomplished, it should be remembered that sometimes the priorities which are published for the voters to view need to be stated succinctly so that potential supporters of the consolidation will not misunderstand or misconstrue the intent of the move.

Goals and Objectives

Once the needs have been identified, specific long-range goals and objectives should be defined. These may include changes in programs, buildings, financial arrangements, or any other related area that is important to the consolidation planning procedure. It is of paramount importance that the goals and objectives be stated so that they are fully understood by the voters in the community at the appropriate time. After all, these are the goals and objectives on which the voters will decide.

Establishment of Procedures

After the needs, goals, and objectives have been isolated and/or

defined, the most crucial step in the planning process begins: that of formulating the strategies based upon community needs. Timing the release of information, along with consideration of the political environment, has a great deal to do with the potential success of the issue. Once the strategies have been agreed upon by the planners, specific programming of the procedures can begin.

Evaluation Criteria

When specific procedures of the program have been mapped out by the planning committee, the following evaluative questions may be asked:

Has ample opportunity for community feedback been provided?

Has an evaluation system been produced?

Have the right people been involved?

Have the state statutes been defined? Have they been satisfied?

Have the benefits of consolidation been projected?

Have long-term projections been validated as much as possible?

Programming the Plan

A number of techniques are available to "program" a plan. Two of those currently used by educators are PERT (Program, Evaluation, and Review Technique) and CPM (Critical Path Method). These systems analysis techniques provide an efficient means of planning and controlling a project--with provisions made for making adjustments where necessary and still maintaining a usable schedule. For additional information, a bibliography of systems analysis has been provided as the Appendix.

Additional Comments

Prior to implementing procedures toward a consolidation effort, it would be useful to conduct a historical review of consolidations within the area of the school district concerned. Much can be learned by evaluating conditions which existed in some of the neighboring school systems prior to and after a consolidation. The specific problems encountered and the relative merits of the consolidation may be identified.

If consolidation does become a reality, it would be worthwhile for the new school district to identify and document new problems created as a result of the merger. The overall long-range benefits resulting from the consolidation should also be documented. The primary purpose for this is twofold: (a) other school districts within the area may be surveying the possibility of a consolidation and would be interested in the planning and progress made and (b) there is a possibility that the newly consolidated school district may desire to consolidate with other districts in the future.

It is suggested, therefore, that the goals and objectives of the consolidation, new programs, curriculum, buildings, and organizational structure be evaluated in an objective manner. Thus, the planning process will be complete.

V

CONCLUSIONS AND RECOMMENDATIONS

Based upon the literature reviewed, numerous conversations, phone calls, and personal experience, it can be concluded with some reliability that, although there are numerous documents relating to school consolidation, few direct attention to school consolidation in the Appalachian region. Specific procedures are nonexistent for such a large area. Although undoubtedly there are state guidelines, they do not necessarily constitute usable suggestions for the Appalachian Commission or related agencies since the scope of Appalachia's problems is much broader than that of a single state. Relatively recent literature relating to Appalachian school consolidation is nonexistent or could not be found.

It is recommended that a broader and more thorough study of the school consolidation process as it applies to Appalachia be conducted utilizing "live" information from those schools which have recently undergone consolidation. Additionally, it is recommended that a general guideline written in a reference-handbook format be made available to all superintendents and boards of educations of small school or rural school districts which may be faced with school consolidation in the near future. It is further recommended that a consolidation task force of experts and specialists be made available to these superintendents since financial limitations might prohibit this on an independent basis. Finally, it is recommended that for the entire Appalachian region a comprehensive consolidation study be adopted and put into effect, thus alleviating a substantial amount of "back tracking" by individual states and local educational agencies.

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